



Estate Planning Council of Pittsburgh 2020 – 2021 Membership Renewal

Name _____

Designations _____

Title _____

Business Name _____

Address _____

City, State, Zip _____

Business Phone _____

Cell # (will be used for text messages) _____

Email _____

Supplemental Email _____

Website _____

Membership Classification (Check only one):

Practicing Attorney _____

CPA _____

Trust Officer _____

Financial Services Professional (CLU®, CFP®, ChFC®, CPWA®, CFA, CAP®, CSPG, CTFA, MSFS, and MST) circle all credentials _____

Financial Services* (Non-Credentialed with _____ years experience

Miscellaneous (Appraiser CVA, ABV, ASA)* _____

Planned Giving Specialist/Consultant* _____

Other (Identify) _____

* _____ years of exp. in the estate planning field. Please attach current resume.

Regular Members \$190

Includes all meals at Membership Meetings held at the Duquesne Club and social events. Regular members are also entitled to discounted admission at the 12th Annual Financial "Four"um on October 29, 2020

Emeritus Members \$25.00

Emeritus Members who, while actively practicing their particular discipline, were Members of the Corporation but who are now either retired or no longer actively practicing, may qualify for Emeritus Membership.

Does not include meals or socials. Discounted admission at the 12th Annual Financial "Four"um on October 29, 2019 is applicable.

Renew your membership with a credit card online at www.epcpittsburgh.org/members/renewal

Or Mail this Renewal Form and Check to:

The Estate Planning Council of Pittsburgh
c/o Ann W. McKenna, Council Executive
P.O. Box 97795, Pittsburgh, PA 15227

Or email to epcpittsburgh@epcpittsburgh.org

Mark your calendar for these EPC meetings:

September 17, Lunch

October 29, 12th Annual Financial "Four"um

January 21, Dinner

March 25, Lunch

May 13, Lunch

For complete details, go to:
www.epcpittsburgh.org

